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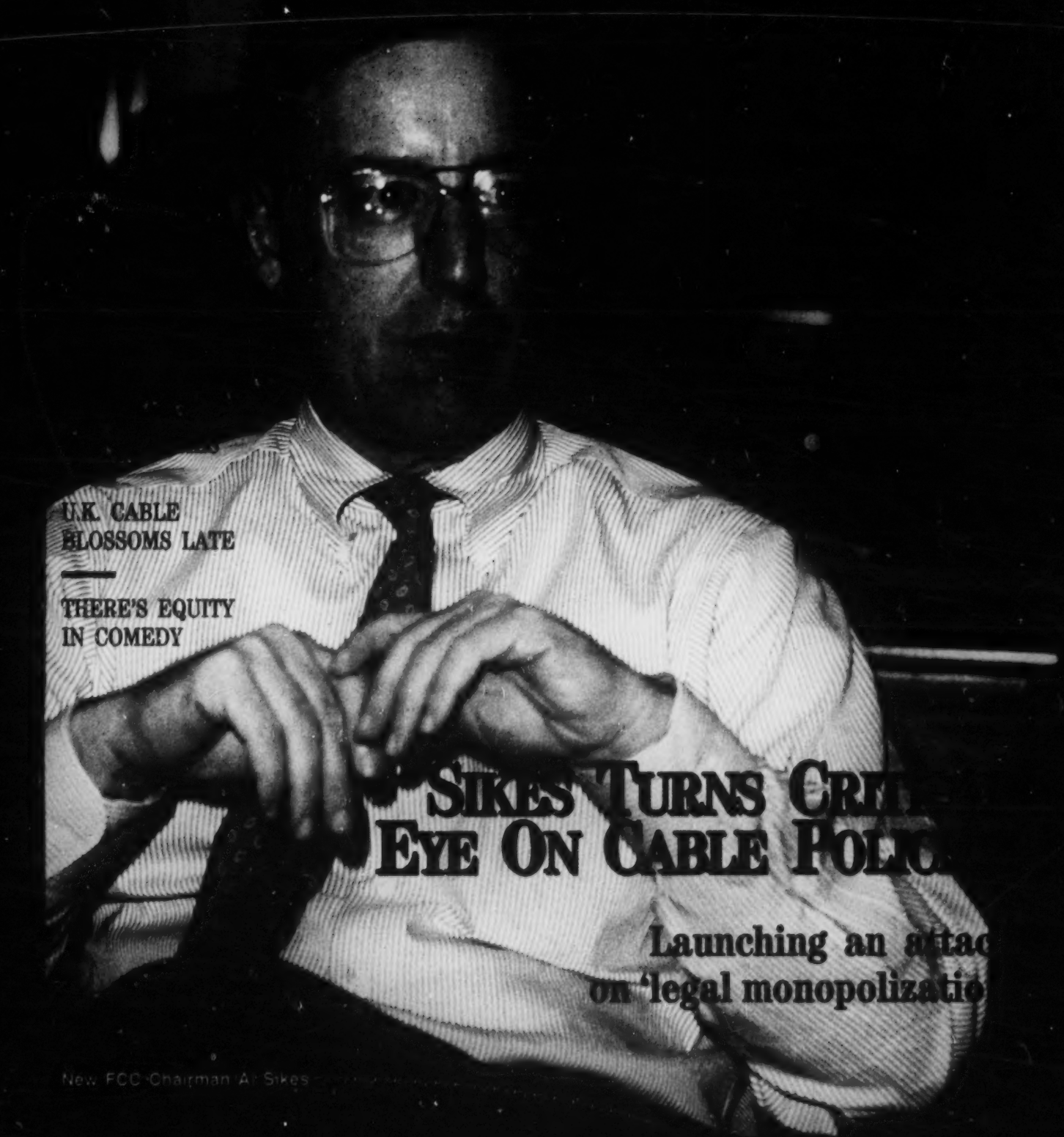
CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT | DECEMBER 4 1989



U.K. CABLE BLOSSOMS LATE

THERE'S EQUITY IN COMEDY

SIKES TURNS CRI... EYE ON CABLE POLI...

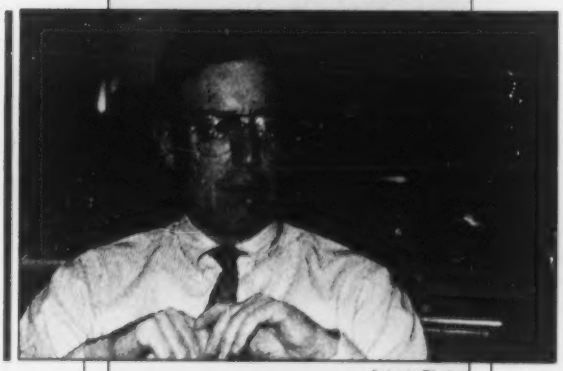
Launching an attac... on 'legal monopolizatio...

New FCC Chairman Al Sikes

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT DECEMBER 4, 1989

COVER STORY



Anker's Photo

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Sikes' cable agenda

A dim view of franchising and 'legal monopolization' is at the core of Al Sikes' philosophy

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Industry leaders take a pounding as reregulation appears all but inevitable

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Palmer cashing out

Deciding to invest further in cellular, Palmer Communications puts 175,000 subs on the market

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An upbeat mood tempered by reregulation and technical questions frames the Anaheim show.

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Better AM laser promised

Jerrold and Ortel will unveil a high-performance AM laser link they say comes close to tough MSO specifications

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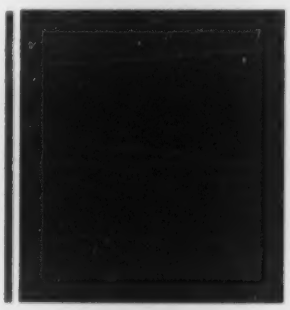
Marketing co-ops advance

Better planning and funding allow regional marketing co-ops to step up plans for 1990



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Panning sub-niche gold

A rash of new networks hope to launch, but the market is crowded and financing is tight

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ABP BPA

million in revenues, up 36.4 percent from $198 million in 1988.

• **General Instrument** will declare a quarterly common stock cash dividend of 12 cents. The dividend will be paid Jan. 2 to shareholders of record Dec. 1. In another action, GI will acquire **Semitron Industries** for $4.7 million. Semitron, based in Cricklade, England, manufactures transient voltage protection devices for telecommunications purposes and is projected to amass $5 million in revenues for the fiscal year ending Sept. 30. GI will operate Semitron within its power semiconductor division.

• **Financial News Network** has completed a $50 million credit facility for working capital and acquisitions use. **Security Pacific** and **Toronto Dominion Bank** arranged the facility.

QUARTERLY EARNINGS CHART

Dollar amount in thousands

Company (Quarter/Fiscal Year)	Revenues	%Change	Operating Profit	%Change	Net Income	%Change
Cablevision Systems (3rd/89)	$ 124,415	- 1.9	$ 52,819	35.8	$ N.A.	N.A.
Financial News Network (1st/90)	15,303	29.1	N.A.	N.A.	1,401	64.1
Turner Broadcasting (3rd/90)	269,329	36.4	51,345	63.8	35,193	103.4
WestMarc Communications (3rd/89)	52,665	37.3	12,381	82.9	8,427	142.3

Contracts/Orders

• **SecaGraphics** will sign a $1.3 million mapping services contract with **Hong Kong Cable Communications Ltd.**, winner of the Hong Kong franchise. The company will install a six workstation drafting system by January, then train 15 HKCC officials and provide consulting services. **US West** owns 25 percent of HKCC, which could become the world's largest cable system with more than 1.5 million homes passed. ■

CLASSIFIEDS

HELP WANTED

CATV TECHNICIAN WANTED

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- Immediate opening for right person
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CHIEF TECHNICIAN

10,000 subscriber Michigan cable system has an immediate opening for a Chief Technician. Responsibilities include supervising technical operations relating to headend, system maintenance, plant projects and CLI audit. Also responsible for technical training and department budgeting. This position reports to the General Manager.

Qualified applicants will have advanced electronics knowledge, a minimum of 5 years cable television experience in troubleshooting, testing, repairing, training; familiarity with OSHA, FCC regulations, and NEC and supervising a technical staff.

Competitive salary and excellent benefit package. Qualified candidates submit resume and requirements to:

CV 12489

PLANT OPERATIONS MANAGER

Storer Cable TV of Garland, TX has an excellent opportunity for a Plant Operations Manager. Responsibilities encompass all plant operations of a 95,000 subscriber cable system. 3 years Cable TV Managerial experience required. Must have strong supervision and communication skills. Computer skills a plus. Position reports to General Manager. We offer excellent salary and benefits. Interested candidates should send resumes to:

Storer Cable TV
934 E. Centerville Rd.
Garland, TX 75041

EOE M/F

HOW TO RESPOND TO A BLIND BOX AD:

CV (Blind Box Number), c/o CableVision Magazine
600 South Cherry Street, Suite 400, Denver, CO 80222

Three out of four systems believe they would pass CLI test if inspected today

In what observers said was a clear case of system managers responding with their hearts rather than their heads, three out of four GMs told Cable Poll™ interviewers that, if their system were inspected today, it would pass the Federal Communications Commission's cumulative leakage index test.

"That seems to be badly at odds with the FCC's own inspection data, which shows that 67 percent of all systems they inspect are in violation today," Wendell Bailey, vice president of science and technology at the National Cable Television Association, said in reacting in disbelief to the data. Bob Dickinson, president of Dovetail Systems in Bethlehem, Pa., a company specializing in helping systems comply with CLI rules, said the level of confidence expressed by system managers perhaps is a reflection not of engineering standards but of simple mathematics: "Some people may be just playing the odds, because they know the number of inspections the FCC can do in a year may be low enough to make it worth the gamble" that they won't get caught.

Number 6 in a series of ten

But that is a gamble that Bailey and others said is a sucker's bet. "The FCC will step up the number of inspections, and the question is not whether there will be any (caught) but how many and (just how hard the FCC will) sting the hell out of them. Everyone out there potentially is the candidate to... find their name up in lights," Bailey said.

Nevertheless, out of nearly 400 system management personnel interviewed on the subject of CLI, most said their systems right now are tight enough to pass muster. Managers at 75 percent of systems with fewer than 10,000 subs, 76 percent of systems with between 10,000 and 50,000 subs and 91 percent of systems with more than 50,000 subs said they believed they are not leaking in excess of the allowable 20 microvolts per meter measured at three meters.

The managers also were asked what steps they have taken to come into compliance with the CLI rules, which take effect July 1 after a five-year notification period. Sixty-one percent of all respondents said they had commissioned an aerial flyover or ground survey to determine what parts of the plant need attention; 98 percent said they had developed a plan to correct leaks identified in the flyover or ground survey; the same 98 percent said they had put that maintenance plan into effect; and 81 percent said that, based on that maintenance plan, they had completed work on correcting identified leaks.

Dickinson said some of that data made sense to him, but he found other responses hard to believe. "It wasn't too long ago that virtually nobody was doing anything (to prepare for implementation of the CLI rules). But today I would say that the major MSOs have taken the situation seriously. I do believe that 98 percent have a plan, but whether it's been tested, that's different." Dickinson based his conclusions on experience from well over 100 flyovers his company has done for cable systems. He said Dovetail is booked solid through next March.

Bailey also cautioned that, even accepting that most operators believe they are in compliance with the rules now, staying in compliance is another matter. "If they have fixed all their leaks today, by the time you get to July 1, 1990, they will have 200 new leaks" due to normal aging of the plant, he said. "I believe the only way to correctly pass this and continue to pass this is to put a plan in place forever. This is not a project with a short time frame on it. Once you commit to it, you must recognize you're committing to it forever."

As the industry gains a better understanding of the engineering work required to comply with CLI, the condition of older systems is beginning to come into critical focus. Observers said that it will be very difficult, perhaps even impossible, for many systems more than 20 years old—certainly those that have not benefited from a large-scale modernization of the plant—to come into compliance short of a complete rebuild.

"There's going to have to be some hard choices," said one MSO chief engineer who asked not to be named. "For us and some other companies I know of, we have some smaller properties that were built in the 1960s that there's no way we could tighten up short of just tearing it down and starting from scratch. You just can't put a Band-Aid on gaping wounds like that. Maybe the best thing for us is to bite the bullet and come July 1 just shut down the aeronautical band. At least that way we stay in business."

Dickinson echoed that thought. "I

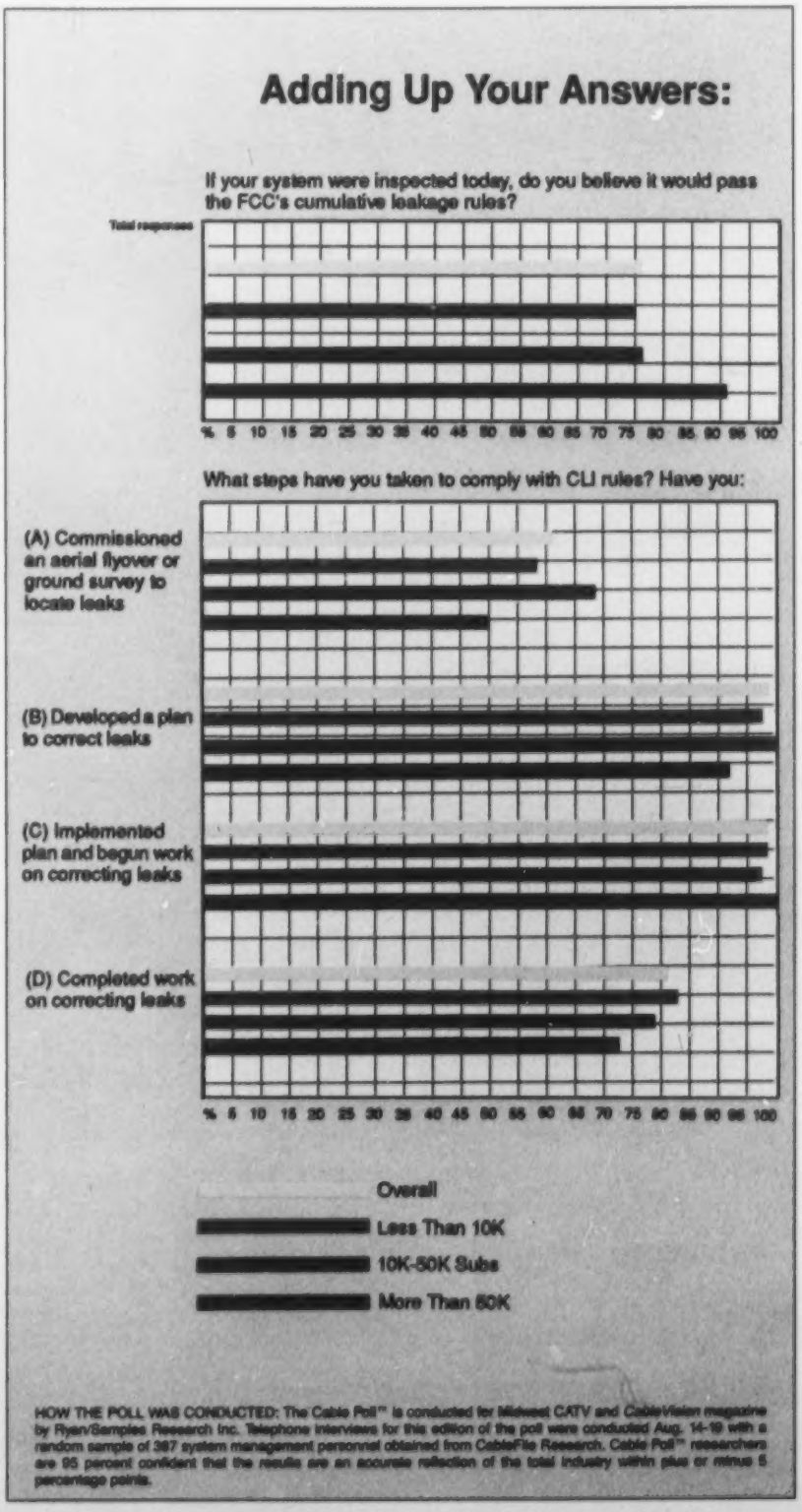
think everybody or most people have some systems that will be hard to fix. You can tighten up any system, but with old systems it's very expensive, perhaps prohibitively so, especially if they weren't built with good fittings to begin with."

But for the vast majority of systems, complying with the CLI rules certainly is not an insurmountable or extremely expensive undertaking, observers noted. As Dickinson said, "the tests are not unreasonable, and people who have things fairly well under control should pass. And once you get a system in pretty good shape, constant maintenance will keep it that way. I also believe that with either the ground-based or the flyover, there is enough leeway in the formulas and procedures... that a system in reasonable shape can pass and still be far from perfect." To which Bailey added: "And be sure to keep your records and paperwork in good order."

The NCTA has conducted six seminars on CLI attended by a total of about 2,000 people, Bailey said. But while the industry's familiarity with the CLI requirements is progressing, Dickinson, who often speaks at trade shows on the subject, said he's shocked by how often someone in the audience will say they haven't heard about the new rules.

"They've (systems) had five years to get ready for this, so the FCC isn't going to be lenient. The commission has put too much into this, so that if they find some people out, they will really nail them." Bailey seconded that thought: "You can fool people with the paperwork up the line (at MSO headquarters) but you can't fool that guy in the truck who comes out from the FCC." ■

Adding Up Your Answers:


If your system were inspected today, do you believe it would pass the FCC's cumulative leakage rules?
Total responses
% 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100
What steps have you taken to comply with CLI rules? Have you:
(A) Commissioned an aerial flyover or ground survey to locate leaks
(B) Developed a plan to correct leaks
(C) Implemented plan and begun work on correcting leaks
(D) Completed work on correcting leaks
% 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100
Overall
Less Than 10K
10K-50K Subs
More Than 50K

HOW THE POLL WAS CONDUCTED: The Cable Poll™ is conducted for Midwest CATV and CableVision magazine by Ryan/Samples Research Inc. Telephone interviews for this edition of the poll were conducted Aug. 14-19 with a random sample of 387 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points.

Top 100 MSO's

Rank		Multiple system operator	Basic subs	
	1.	Tele-Communications Inc.	6,228,526	(6/89)
	2.	American Television & Communications Corp.	4,202,000	(10/89)
(4)	3.	UA Entertainment	2,530,000	(9/89)
(3)	4.	Continental Cablevision	2,486,358	(7/89)
	5.	UA Entertainment	2,530,000	(9/89)
	5.	Warner Cable Communications	1,700,000	(9/89)
	6.	Storer Cable Communications	1,531,000	(8/89)
	7.	Cox Cable Communications	1,500,000	(10/89)
	8.	Comcast	1,490,000	(11/89)
	9.	Cablevision Systems	1,387,771	(10/89)
	10.	Jones Intercable/Spacelink	1,325,552	(10/89)
	11.	Newhouse Broadcasting	1,147,000	(5/89)
	12.	Heritage Communications	1,131,543	(11/89)
	13.	Times Mirror Cable TV	1,061,486	(10/89)
(15)	14.	Viacom Cable	986,000	(11/89)
(14)	15.	Cablevision Industries	972,900	(8/89)
	16.	Sammons Communications	870,898	(9/89)
	17.	Century Communications	825,000	(10/89)
	18.	Adelphia Communications	751,700	(9/89)
	19.	Paragon Communications	750,000	(10/89)
	20.	Cooke Cablevision	730,800	(5/89)
	21.	Falcon Cable TV	700,000	(10/89)
	22.	Telecable	580,000	(5/89)
	23.	WestMarc Communications	564,009	(9/89)
	24.	KBLCOM	558,100	(4/89)
	25.	Scripps-Howard	539,000	(9/89)
	26.	Multivision Cable TV	482,000	(4/89)
	27.	Tele-Media	475,163	(9/89)
	28.	Prime Cable	458,000	(6/89)
	29.	Lenfest Group	437,835	(8/89)
	30.	Post-Newsweek Cable	403,000	(4/89)
(32)	31.	Maclean Hunter Cable TV	357,500	(5/89)
(33)	32.	TCA Group	349,300	(4/89)
(34)	33.	Colony Communications	327,793	(9/89)
(35)	34.	Rifkin & Associates	324,000	(6/89)
(36)	35.	Multimedia Cablevision	321,300	(6/89)
(41)	36.	Simmons Communications*	315,000	(11/89)
(38)	37.	TKR Cable	278,482	(5/89)
(39)	38.	Triax Communications	277,500	(6/89)
(40)	39.	Western Communications	266,700	(4/89)
(31)	40.	Cencom Cable	261,889	(10/89)
(42)	41.	Hauser Communications	247,000	(7/89)
(37)	42.	Centel Cable	242,000	(11/89)
	43.	Star Cablevision Group	240,096	(8/89)
	44.	Service Electric Cable TV Inc.	211,500	(4/89)
	45.	Greater Media	205,000	(9/89)
	46.	King Videocable	190,915	(8/89)
	47.	Sutton Capital	189,179	(9/89)
	48.	Harron Communications	185,000	(8/89)
	49.	Columbia International	176,350	(8/89)
	50.	Media General	176,068	(6/89)
	51.	C-TEC Cable Systems	174,814	(9/89)
	52.	U.S. Cable Corp.	168,000	(9/89)
	53.	Palmer Communications	160,551	(5/89)
	54.	Insight Communications	157,700	(4/89)
	55.	Armstrong Utilities	153,337	(7/89)
(57)	56.	Northland Communications	141,398	(11/89)
(56)	57.	Summit Communications	141,000	(10/89)
	58.	Bresnan Communications	127,105	(8/89)
	59.	Booth Communications	124,893	(9/89)
	60.	Sonic Communications	117,551	(5/89)
	61.	Susquehanna Broadcasting	116,370	(9/89)
	62.	McDonald Group	113,200	(4/89)
	63.	United Video Management	113,132	(8/89)
	64.	Pencor Services	107,200	(10/89)
	65.	First Carolina Communications	99,500	(3/89)
	66.	Midcontinent Cable Systems Co.	95,350	(6/89)
	67.	WEHCO Video	93,900	(4/89)
	68.	Gilbert Media	85,000	(6/89)
	69.	Coaxial Communications	80,000	(5/89)
	70.	Selkirk Communications	80,000	(9/89)
	71.	Mission Cable	72,294	(8/89)
	72.	Barden Cablevision	70,945	(8/89)
	73.	Douglas Communications	70,500	(8/89)
	74.	James Cable Partners	70,000	(4/89)
	75.	Cardinal Comunications	60,500	(6/89)
	76.	Prestige Cable TV Inc.	60,410	(7/89)
(84)	77.	Leonard Communications	60,000	(10/89)
(77)	78.	Omega Communications	60,000	(8/89)
(78)	79.	Helicon Corp.	59,000	(8/89)
(79)	80.	Hearst Communications Of California	58,200	(5/89)
(80)	81.	Fanch Communications	58,000	(6/89)
(81)	82.	Telesat Cablevision Inc.	57,235	(6/89)
(82)	83.	State Cable TV	54,700	(5/89)
(83)	84.	Galaxy Cablevision	54,627	(8/89)
	85.	Joseph Gans Cable TV	50,000	(8/89)
	86.	New England Cablevision	49,000	(4/89)
	87.	Republic Communications Corp.	48,000	(5/89)
	88.	Rock Associates	47,500	(3/89)
	89.	Donrey Media Group	47,500	(5/89)
	90.	360 Corp.	45,000	(5/89)
	91.	Cable America Corp.	44,045	(9/89)
(94)	92.	CableSouth Inc.	43,420	(10/89)
(92)	93.	Cable Holdings Inc.	43,135	(10/89)
(93)	94.	Masada Corp.	43,120	(8/89)
	95.	Star Cable Associates	42,000	(8/89)
	96.	Eastern Connecticut Cable TV	41,820	(6/89)
	97.	C4 Media	41,275	(7/89)
	98.	Raystay Co.	40,447	(8/89)
	99.	Acton Corp.	40,400	(3/89)
	100.	Schurz Communications	40,078	(8/89)

( ) Rank last listing

*** Reflects Centel Cable acquisition***

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.*

Top 100 Systems

Rank	Location	Operator	Basic subs	
1.	Long Island, NY	Cablevision Systems	479,594	(10/89)
2.	Orlando/Central Complex, FL	ATC	400,000	(10/89)
3.	San Diego, CA	Cox Cable	303,637	(6/89)
4.	San Antonio, TX	KBLCOM	234,835	(6/89)
5.	Manhattan, NY	ATC	231,864	(6/89)
6.	Puget Sound, WA	Viacom	225,800	(6/89)
7.	Phoenix, AZ	Times Mirror	220,968	(5/89)
8.	East Orange, NJ	Maclean Hunter	212,000	(6/89)
9.	Honolulu, HI	ATC	206,251	(10/89)
10.	Chicago (suburbs), Il	Continental	181,537	(9/89)
11.	Rochester, NY	ATC	180,000	(9/89)
12.	Houston, TX	Warner	179,000	(9/89)
13.	Wayne, NJ	UA Entertainment	176,838	(11/89)
14.	Louisville/Jeff. Co., KY	Storer Communications	170,000	(8/89)
15.	Cherry Hill, NJ	Garden State Cable	168,000	(9/89)
16.	Cincinnati, OH	Warner	167,000	(6/89)
17.	Atlanta, GA	Prime Cable	166,000	(9/89)
18.	Cleveland, OH	Cablevision Systems	165,799	(10/89)
19.	Hampton Roads, VA	Cox Cable	164,699	(6/89)
20.	Fairfax, VA	Media General	164,519	(6/89)
21.	Tulsa, OK	UA Entertainment	159,551	(7/89)
22.	Connecticut Complex	Cablevision Systems	158,569	(10/89)
23.	Kansas City, MO	ATC	158,500	(11/89)
24.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
25.	Hartford/Plainville/Vernon, CT	UA Entertainment	152,683	(6/89)
26.	Chicago, IL	TCI	148,857	(4/89)
27.	Charlotte, NC	ATC	148,850	(9/89)
28.	Brooklyn/Queens, NY	Warner	147,000	(9/89)
29.	San Jose/Campbell, CA	Heritage	145,000	(6/89)
30.	Baltimore County, MD	Comcast	144,000	(8/89)
31.	Memphis/W. Memphis, TN	ATC	143,957	(10/89)
32.	Manhattan, NY	Paragon	143,500	(6/89)
33.	Pompano, FL	Continental	140,084	(9/89)
34.	Buffalo, NY	Adelphia Comm.	139,515	(8/89)
35.	Denver (suburbs), CO	UA Entertainment	139,303	(6/89)
36.	San Diego, CA	ATC	135,300	(11/89)
37.	St. Louis, MO	Cencom	135,250	(8/89)
38.	San Francisco, CA	Viacom	134,000	(6/89)
39.	Austin, TX	ATC	126,100	(10/89)
40.	Martin/Stuart Co, FL	Centel	125,000	(10/89)
41.	Seattle, WA	TCI	124,613	(4/89)
42.	Warren, NJ	TKR	119,358	(7/89)
43.	Pinellas County, FL	Newhouse	114,000	(6/89)
44.	Wilmington, DE	Heritage	112,000	(6/89)
45.	Tacoma, WA	Viacom	112,000	(6/89)
46.	Grand Rapids, MI	UA Entertainment	111,198	(6/89)
47.	San Diego County, CA	Times Mirror	111,029	(5/89)
48.	Toledo, OH	Blade Communications	110,785	(5/89)
49.	Southeast Michigan	Comcast	110,000	(8/89)
50.	Chicago Suburbs, IL	Centel	109,576	(5/89)
51.	Raleigh/Durham, NC	ATC	109,000	(9/89)
52.	Las Vegas, NV	Prime Cable	107,288	(5/89)
53.	Dallas, TX	Heritage	107,244	(6/89)
54.	Jefferson Parish/Kenner, LA	Cox Cable	106,332	(6/89)
55.	San Juan, PR	Multivision Cable	106,046	(6/89)
56.	Indianapolis, IN	Comcast	104,060	(6/89)
57.	Nashville, TN	Viacom	101,500	(6/89)
58.	Boston/Brookline, MA	Cablevision Systems	101,471	(10/89)
59.	Hillsborough/Tampa, FL	Paragon	100,281	(2/89)
60.	Pittsburgh, PA	TCI	98,952	(8/89)
61.	Jackson, MS	ATC	98,915	(10/89)
62.	Chicago, IL	Group W	98,700	(5/89)
63.	Monmouth, NJ	Sutton Capital	97,579	(9/89)
64.	Greensboro, NC	ATC	96,140	(10/89)
65.	St. Petersburg, FL	Paragon	95,412	(2/89)
66.	Columbus, OH	Warner	95,000	(9/89)
67.	Reading, PA	ATC	95,000	(10/89)
68.	Naples, FL	Palmer	94,450	(6/89)
69.	Worcester Complex, MA	Greater Media	94,897	(9/89)
70.	Richmond, VA	Continental	92,272	(10/89)
71.	Portland, OR	KBLCOM	91,500	(8/89)
72.	Dade/Broward County, FL	Storer	90,000	(8/89)
73.	Wichita, KS	Multimedia	88,732	(9/89)
74.	Independence,MO	Jones	88,628	(8/89)
75.	Tucson, AZ	Cooke	86,976	(8/89)
76.	Fresno, CA	Continental	86,317	(10/89)
77.	Akron, OH	Warner	86,000	(9/89)
78.	Fayetteville, NC	ATC	86,000	(10/89)
79.	Milwaukee, WI	Warner	86,000	(9/89)
80.	Minneapolis/St. Paul suburbs, MN	Hauser	86,000	(10/89)
81.	Harrisburg, PA	Sammons	85,200	(8/89)
82.	Orange County, CA	KBLCOM	85,100	(8/89)
83.	Baton Rouge, LA	UA Entertainment	84,976	(6/89)
84.	Dover/Morristown, NJ	Sammons	84,640	(8/89)
85.	Montgomery County, MD	Hauser	84,000	(8/89)
86.	Albuquerque, NM	Jones Intercable	83,119	(5/89)
87.	South Bend, IN	Heritage	82,744	(6/89)
88.	Houston Suburbs, TX	Prime Cable	82,000	(6/89)
89.	Medford Complex	Warner	82,000	(6/89)
	Boston Suburbs, MA			
90.	Buffalo, NY	TCI	81,358	(7/89)
91.	Oakland County, MI	UA Entertainment	80,564	(8/89)
92.	Oklahoma City, OK	Cox Cable	79,104	(6/89)
93.	New Orleans, LA	Cox Cable	78,979	(6/89)
94.	Providence/Warwick, RI	Times Mirror	78,528	(6/89)
95.	W. San Fernando Valley, CA	CV Industries	78,369	(8/89)
96.	Allentown, PA	Service Electric	78,080	(8/89)
97.	Thousand Oaks, CA	Western	78,000	(8/89)
98.	Indianapolis, IN	ATC	75,765	(10/89)
99.	Omaha, NE	Cox Cable	75,625	(6/89)
100.	South Texas, TX	Heritage	73,560	(6/89)